

# **“Library Management 101A: From Strategic Planning to Managing Staff and Volunteers”**

by  
Kathy Bloomfield

## **Attachments**

Association of Jewish Libraries Conference  
July 5, 2010  
Seattle, WA

## Attachment A

**Library Management 101A:  
From Strategic Planning to Managing Staff and Volunteers.  
Association of Jewish Libraries Convention  
July 5, 2010**

# Mission Statement Worksheet

1. **What are the opportunities or needs that we exist to address?** (the purpose of the organization.)
2. **What are we doing to address these needs?** (the business of the organization.)
3. **What principles or beliefs guide our work?** (the values of the organization.)

**Attachment B**

**Library Management 101A:  
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**Association of Jewish Libraries  
Mission Statement**

The Association of Jewish Libraries promotes Jewish literacy through enhancement of libraries and library resources and through leadership for the profession and practitioners of Judaica librarianship. The Association fosters access to information, learning, teaching and research relating to Jews, Judaism, the Jewish experience and Israel.

## **Attachment C**

### **Library Management 101A: From Strategic Planning to Managing Staff and Volunteers. Association of Jewish Libraries Convention July 5, 2010**

#### **(EXAMPLE) MISSION STATEMENT\* B'NAI SEFERIM LIBRARY**

The mission of the B'nai Seferim Library is

- To provide our congregants with research, educational, and recreational materials which promote the study of Judaism and general topics of Jewish interest. The Adult collection places particular emphasis on Bible, Talmud and Liturgy, both primary and secondary sources, and includes current adult fiction and non-fiction. The Children's and Young Adult collections emphasize holidays, Bible stories and juvenile fiction.
- To organize such materials in a logical manner for easy access by all.
- To assure a pleasant atmosphere conducive to reading and learning for browsers, readers and borrowers.
- To work closely with the Rabbi and the Adult Education Committee in order to complement the synagogue's educational programs with library resources.
- To keep abreast of Judaica publishing and to purchase the most relevant and timely materials consonant with the overall mission of the synagogue.

\*Thank you to Kathe Pinchuck for providing this Mission Statement.

**Attachment D**

**Library Management 101A:  
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**B'nai Seferim Library Long Term Plan**

<b><u>Objective</u></b>	<b><u>Goal</u></b>	<b><u>Time Frame</u></b>	<b><u>Action</u></b>	<b><u>Responsible Person</u></b>	<b><u>Target Date</u></b>

## Attachment E

### **Library Management 101A: From Strategic Planning to Managing Staff and Volunteers. Association of Jewish Libraries Convention July 5, 2010**

#### **Management Style Test**

There are many types of personality tests/style tests used in the business world – Myers-Briggs, Galen, Jung, DISC, Gardner's Multiple Intelligences etc. All attempt to do the same thing, get us to see ourselves and those around us a little better, in order to manage the workplace a bit better. This particular personality test uses the traits of animals to see if we can understand ourselves better. See if it helps you. **Always remember, there are no right or wrong answers – only insights.**

Gary Smalley Personality Types Inventory

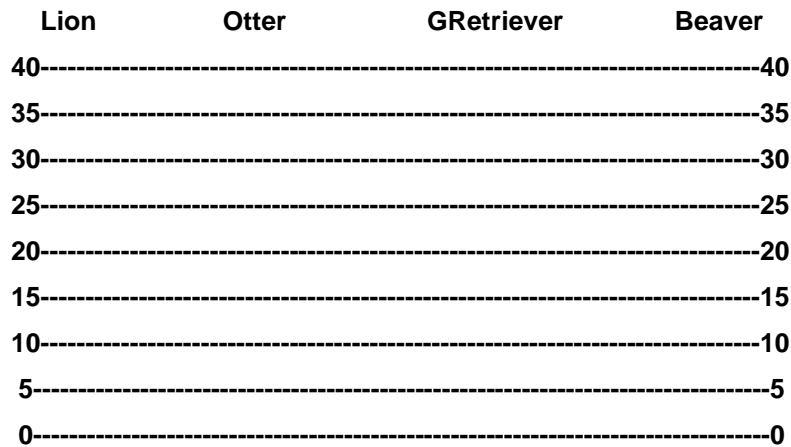
(from *Making Love Last Forever*, Ch. 10: Understanding Personality Types: A Key to Lovability)

#### How to Take and Score the Inventory

1. For each temperament type, circle the positive traits (in the left column) that sound the most like you – as you are at work. It will probably help to cover the right hand column as you take the inventory, to help you focus on the positives. Do not score yourself as you behave at home. (If you want to evaluate your “at home” tendencies, take the test again later, with that environment - or any other - in mind.) For now, ignore the right hand column.
2. For each trait, add up the number of circled traits (in the left column) and then double that number. This is your “score.”
3. To graph your temperament “mix”, mark your score for each temperament type on the graph with a large dot. If you want, draw a line to connect the dots.

## Attachment E, cont'd.

### Charting the Results



How did you do? Remember this isn't a pass-fail test. This evaluation simply shows your tendencies and traits. As you look at your charted score, you may see a blend of all four categories. That's fine. Or you may see two scores significantly higher than the others. Or you may have one category that's head and shoulders above the other three. No one pattern is "correct." Now take note of the right-hand column extreme for each of your circled characteristics. This might be how your positive traits are perceived by your family or friends.

**Lions** are leaders, decisive, bottom line, problem-solvers, not conversational.

**Otters** are fun-loving, entertainers, networkers, motivators, creative, talkers.

**Retrievers** are loving, nurturing, loyal, good listeners, encouragers.

**Beavers** are hard-working, detailed, accurate, focused on quality.

Consciously work to become more aware of your natural tendencies. Go for a healthy balance, tempering any extreme problem area, focus on your strengths and learn to cultivate the strengths of less dominant personality

traits. Some suggestions for each personality type:

**Lions:** Be softer and more gentle and include others when making decisions.

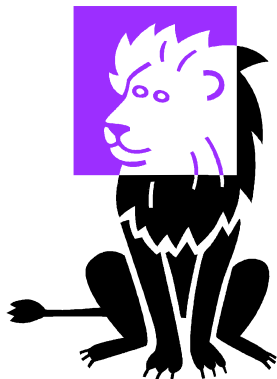
**Otters:** Think before you speak, and consider consequences before you act.

**Retrievers:** Practice saying no and making firm decisions.

**Beavers:** Learn to relax and don't expect others to do things just like you.

For a more in depth study on personality development, you can read **The Two Sides of Love** by Gary Smalley and John Trent.

## Attachment E, cont'd.



### **Lion:**

"Let's do it now!"

#### *Temperament Characteristics*

##### Strengths

Likes authority  
Takes charge  
Determined  
Confident  
Firm  
Enterprising  
Competitive  
Enjoys challenges  
Problem solver  
Productive  
Bold.  
Purposeful; goal driven  
Decision maker  
Adventurous  
Strong 'willed  
Independent; self reliant  
Controlling  
Persistent  
Action oriented.

##### Vulnerabilities

Too direct or demanding  
Pushy; can step in front of others  
Overbearing  
Cocky  
Unyielding  
Takes big risks  
Cold blooded  
Avoids relations  
Too busy  
Overlooks feelings; do it now!  
Insensitive  
Imbalanced; workaholic  
Unthoughtful of others' wishes  
Impulsive  
Stubborn  
Avoids people; seeking help  
Bossy; overbearing  
Inflexible  
Unyielding

**Lion Score (Double the number circled):** \_\_\_\_\_



### **Otter:**

"Trust me! It'll work out!"

#### *Temperament Characteristics*

##### Strengths

Enthusiastic  
Takes risks  
Visionary  
Motivator  
Energetic  
Very verbal  
Promoter  
Friendly, mixes easily  
Enjoys popularity  
Fun loving  
Likes variety  
Spontaneous  
Enjoys change  
Creative; goes for new ideas  
Group oriented  
Optimistic  
Initiator  
Infectious laughter  
Inspirational

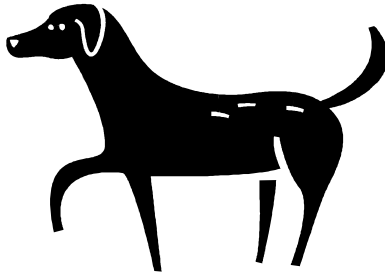
##### Vulnerabilities

Overbearing  
Dangerous and foolish  
Daydreamer  
Manipulator  
Impatient  
Attacks under pressure  
Exaggerates  
Shallow relationships  
Too showy  
Too flippant; not serious  
Too scattered  
Not focused  
Lacks follow through  
Too unrealistic; avoids details  
Bored with "process"  
Doesn't see details  
Pushy  
Obnoxious  
Phony

**Otter score {Double the number circled}:** \_\_\_\_\_



## Attachment E, cont'd.

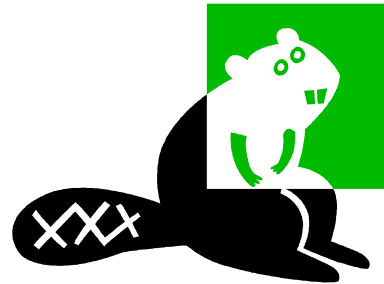


### **Golden Retriever:**

"Let's keep things the way they are."

#### *Temperament Characteristics*

<u>Strengths</u>	<u>Vulnerabilities</u>
Sensitive feelings	Easily hurt
Loyal	Misses opportunities
Calm; even keeled	Lacks enthusiasm
Undemanding	Weakling; pushover
Avoids confrontations	Misses honest intimacy
Enjoys routine	Stays in rut
Dislikes change	Not spontaneous
Warm and relational	Fewer deep friends
Gives in	Co-dependent
Accommodating	Indecisive
Cautious humor	Overly cautious
Adaptable	Loses identity
Sympathetic	Holds on to others' hurts
Thoughtful	Can be taken advantage of
Nurturing	Ears get smashed
Patient	Crowded out by others
Tolerant	Weaker convictions
Good listener	Attracted to hurting people
Peacemaker	Holds personal hurts inside
<b>Retriever score (Double the number circled): _____</b>	



### **Beaver:**

"How was it done in the past?"

#### *Temperament Characteristics*

<u>Strengths</u>	<u>Vulnerabilities</u>
Reads all instructions	Afraid to break rules
Accurate	Too critical
Consistent	Lacks spontaneity
Controlled	Too serious
Reserved	Stuffy
Predictable	Lacks variety
Practical	Not adventurous
Orderly	Rigid
Factual	Picky
Conscientious	Inflexible
Perfectionistic	Controlling
Discerning	Negative on new opportunities
Detailed	Rarely finishes a project
Analytical	Loses overview
Inquisitive	Smothering
Precise	Strict
Persistent	Pushy
Scheduled	Boring
Sensitive	Stubborn
<b>Beaver score (Double the number circled): _____</b>	

## **Attachment F**

### **Library Management 101A: From Strategic Planning to Managing Staff and Volunteers. Association of Jewish Libraries Convention July 5, 2010**

## **Kathy's Key Commandments for Keeping Contented Staff:**

1. The Golden Rule works in business the same way it works in life. Treating your team the way you would want to be treated earns you bonus miles.
2. Saying thank you to staff and volunteers on a regular basis – like every single day – also pays dividends.
3. A jar full of chocolates and wrapped candies on the corner of your desk will guarantee that you know everything that is going on in the office.
4. Staff meetings are important. Once scheduled, they are sacred time. Try to schedule a potluck lunch occasionally along with the meeting. Food is a good thing. You spring for dessert.
5. Staff seeing their boss getting his or her hands dirty demonstrates your willingness to see things from their perspective.
6. Listen.
7. Communication must be constant and ongoing. All channels must be clear at all times. Blocked channels create toxic environments.
8. Be unwaveringly honest. If you don't know, say that. If you can't say, say that. Do not tell a lie. It will bite you in the butt every single time.
9. Admit your mistakes. Laugh about them. They know you are human – you should too.
10. More often than not, your staff knows more than you do. If they trust you, they will tell you what they know. That trust is built on all of the above.

## **Attachment G**

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## **When Chocolate Doesn't Work**

Step 1: Do Your Homework

Step 2: Talk to the Employee

Step 3: Restate the Problem and the Need for Resolution

Step 4: Ask the Employee for Suggestions for Resolution

Step 5: Get a Commitment from the Employee that the Problem will Stop. Set a Deadline for the Problem to End, if Necessary.

Step 6: Follow Up on Any Deadlines You Set

Step 7: Document Any Discussions of This Type

**Important! Always make sure your Rabbi, Principal, President, Administrator, Human Resources Department, Higher Authority are aware of any problem of this type prior to the documentation phase.**

## **Attachment H**

### **Library Management 101A: From Strategic Planning to Managing Staff and Volunteers. Association of Jewish Libraries Convention July 5, 2010**

#### **Job Performance Review Sheets**

##### **Example I**

To be filled out by the supervisor about support staff performance

For the evaluation of \_\_\_\_\_

To be filled out by \_\_\_\_\_

Date \_\_\_\_\_

**KNOWLEDGE OF WORK:** Consider the employee's knowledge of or ability in the present job gained through experience and practical know-how.

- \_\_\_\_\_ Knows all phases of work
- \_\_\_\_\_ Has enough knowledge/ability to perform work without assistance
- \_\_\_\_\_ Has an adequate grasp of the essentials
- \_\_\_\_\_ Needs some assistance
- \_\_\_\_\_ Requires considerable assistance
- \_\_\_\_\_ Possesses inadequate knowledge/ability

**INTERPERSONAL SKILLS (with congregation members)**

- \_\_\_\_\_ Has excellent interpersonal skills and acts to resolve interpersonal conflicts
- \_\_\_\_\_ Is particularly effective in working with others
- \_\_\_\_\_ Relates to others in an acceptable fashion
- \_\_\_\_\_ Has difficulty with interpersonal relationships
- \_\_\_\_\_ Is unable to relate to others

**QUANTITY OF WORK:** Consider the volume of the work produced by the staff member under normal circumstances.

- \_\_\_\_\_ Excellent volume; rapid worker
- \_\_\_\_\_ Good volume
- \_\_\_\_\_ Enough volume to get by
- \_\_\_\_\_ Less volume than adequate
- \_\_\_\_\_ Inadequate volume

**ORGANIZATIONAL ABILITY:** Consider the employee's effectiveness in planning his or her own work and setting priorities.

- \_\_\_\_\_ Plans and prioritizes work exceptionally well
- \_\_\_\_\_ Is consistently well organized
- \_\_\_\_\_ Is sufficiently able to plan and prioritize work
- \_\_\_\_\_ Needs assistance in planning work
- \_\_\_\_\_ Is unable to organize work

**DEPENDABILITY:** Consider the employee's reliability to carry out assignments conscientiously and effectively.

- \_\_\_\_\_ Can be relied on at all times by superior
- \_\_\_\_\_ Employee's judgment seldom needs to be questioned
- \_\_\_\_\_ Is conscientious in carrying out assignments with supervision
- \_\_\_\_\_ Requires frequent questioning of judgment
- \_\_\_\_\_ Needs careful supervision of assignments

**INTERPERSONAL SKILLS (with other staff members)**

- \_\_\_\_\_ Possesses excellent interpersonal skills and acts to resolve interpersonal conflicts
- \_\_\_\_\_ Is particularly effective in working with others
- \_\_\_\_\_ Relates to others in an acceptable fashion
- \_\_\_\_\_ Has difficulty with interpersonal relationships
- \_\_\_\_\_ Is unable to relate to others

**QUALITY OF WORK:** Consider the staff member's neatness, accuracy, and results, regardless of volume.

- \_\_\_\_\_ Is exceptionally accurate and neat; follows the procedures
- \_\_\_\_\_ Exceeds acceptable levels; does neat work that rarely needs checking
- \_\_\_\_\_ Does work that is acceptable and is usually neat; commits occasional errors
- \_\_\_\_\_ Often does unacceptable work; commits frequent errors
- \_\_\_\_\_ Makes too many errors and lacks neatness; does not know the procedures

## Attachment H, cont'd

### Example II

Name \_\_\_\_\_

Job \_\_\_\_\_

Performance Planning Meeting  
Objectives

Date \_\_\_\_\_

1.

2.

3.

Date \_\_\_\_\_

Agreed to by \_\_\_\_\_

#### PERFORMANCE APPRAISAL MAY-JUNE

Items	UN	NI	A	E

#### PERFORMANCE APPRAISAL MID-JANUARY

Items	UN	NI	A	E

UN (unsatisfactory); NI (needs improvement); A (average); E (excellent)

Supervisor's Comments

Supervisor's Comments

Committee Chair's Comments

Committee Chair's Comments

Development Plan

Development Plan

Reviewed with Employee

Reviewed with Employee

Date \_\_\_\_\_

Date \_\_\_\_\_

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Employee's Signature

Employee's Comments

Employee's Comments

\_\_\_\_\_  
Supervisor's Signature

\_\_\_\_\_  
Supervisor's Signature

## **Attachment I**

### **“Library Management 101A: From Strategic Planning to Managing Staff and Volunteers”**

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### **Attachment I , cont'd.**

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**Kathy Bloomfield**

Over the past 35 years in business, Kathy Bloomfield has been

- A long distance telephone operator
- An Associate Curator at the Los Angeles Zoo
- A Team Manager, Trainer and Professional Developer at Pacific Telephone
- A Strategic Planner, Customer and Technology Services Manager at Pacific Bell
- The Creator of forwordsbooks, a national Jewish book fair and catalog sales business
- The Book Club Editor for BabagaNewz magazine,
- The Community Development Director at InterfaithFamily.com,
- The Mikveh Center Director at Mayyim Hayyim Community Mikveh,
- The URJ Outreach Ambassador for the Union for Reform Judaism Northeast Council
- The Assistant Regional Director for the Union for Reform Judaism Northeast Council.

Her volunteer roles have included

- Temple President
- Mikveh Guide
- URJ Outreach Fellow
- Member, Sydney Taylor Book Award Committee.

Kathy's motto is "Nothing you ever do in life is wasted."

She is currently writing a children's book and has restarted forwordsbooks as an on line book review and blog site. The forwords Catalog of Books is now available on the website.

You can visit Kathy at her website at <http://forwordsbooks.com>